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*Production of Principal Crops**
Average 1935-38
('000 metric tons)

Wheat	3,077
Rye	430
Barley	1,071
Oats	604
Maize	5,215
Potatoes ..	2,010
Sugar beet† ..	570
Peas	45
Beans	230
Tobacco ..	12
Sunflower seed	177
Soya beans ..	42
Rape seed ..	48

* Pre 1939 frontiers.
† This produced 110,000 m. tons of raw sugar

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4. Livestock

One of the chief weaknesses of Rumanian agriculture is the low density of livestock. Numbers of cattle per 100 acres of farm land are less than half those of this country and Germany; about half the farms possess no cows. A large proportion of the cattle, moreover, are draught animals which require land to feed them but which yield little saleable produce. Moreover, the annual milk yield per cow averages less than 1,350 litres (300 gallons) as compared with over 700 gallons in Denmark.

[234]

Of pigs, the numbers and quality compare even less favourably with those of other countries. Only in the Banat district is there an approach to an interlocking of grain production with pig-raising. Sheep are an important source of income to the peasants of the Transylvanian mountains, a region where water buffaloes are kept as draught animals since they require no sustenance other than a daily cold bath and a few maize stalks.

Livestock numbers in 1938, and the production of livestock products in 1935-38, were as follows:—

*Livestock Numbers**
'000 head

Horses	2,158
Cattle	4,161
(including cows)	(2,030)
Buffaloes ..	165
Sheep	12,768
Goats	390
Pigs	3,165
Poultry ..	34,666

* Pre-1939 frontiers.

*Production of Livestock Products**
Average 1935-38
('000 metric tons)

[234]

Milk‡	3,000
Butter	20
Cheese	30
Beef and veal ..	120
Mutton and lamb	20
Pork	152
Poultry meat ..	60

* Pre-1939 frontiers.
‡ Cows, buffaloes, sheep and goats.

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[656]

5. Fish

All fishing along the Danube, including the mouths of the delta, and along the western shores of the Black Sea coast, is controlled by the State Fisheries Administration. The total annual catch in State-owned waters averaged 15,000 tons in the years immediately preceding the war, of which fresh-water fish contributed more than two-thirds. This does not, however, represent the total catch, as fairly large quantities were caught

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228 in private waters. Supplemented by some 4,000 tons of imported fish, this provided nearly 1 kg. (2·2 lb.) per head of population, but, in fact, almost all the fish was consumed by the 5 million persons living in towns. The principal fish caught were sturgeon, carp, pike, eels and crayfish, the main fishing centres being Brăila, Tulcea and Ismail.

6. Food Industries

256 The chief food and agricultural-processing industries are milling, sugar manufacture, oilseed crushing and tobacco curing. While the milling industry was dispersed widely about the country in more than 15,000 small mills employing altogether over 37,000 persons (at 1930 census), the sugar industry was for the most part concentrated in the plain of the Old Kingdom. Of the 17 sugar 257 factories employing 10,000 workers, only one was in the Transylvanian districts lost to Hungary and five in the areas temporarily lost to the U.S.S.R. The vegetable-oil industry, located chiefly in 258 Bessarabia, was only partly carried on in factories, of which there were (on January 1st, 1930) 417, employing 2,026 workers. Among these, 34 were fitted both to extract crude oil and to refine it, six were exclusively refineries, while the remainder produced only crude oil. The rest of the industry consisted of some 2,000 hand, or animal-driven presses mostly owned by individual peasants or by shopkeepers. These primitive presses extracted only a low percentage of oil from the seeds, and consequently the cake—mainly sold for export—had an unusually high oil content. As regards 277 tobacco, both curing and cigarette manufacture [656] were subject to government licence and control. There were 29 factories (in 1930) employing 9,720 workers, but tobacco cultivation subsequently declined, so also doubtless did the numbers employed.

7. Agricultural Organisation

452 The history of the organisation of Rumanian 241 farmers is one of not too successful co-operatives 474 becoming transformed more and more into agencies for the execution of Government Control Schemes. [654] For many years there had been throughout the country a network of agricultural credit societies, co-operative in form but in practice directed by the State. *These played an important rôle during the* period of the Land Reform in helping the peasants by advances to buy and equip their newly acquired holdings. There was even some co-operative cultivation for a time, until the new peasant-owners could muster sufficient draught animals and implements. Besides this, there have been strong [162] local co-operative unions especially among the minority nationalities—the Hungarians in Transylvania, the Swabian and Saxons in the Banat and the Russian and Polish Jews in the Bucovina.

243 The credit societies revived in importance when, 474 after 1933, the Rumanian Government began to 452 organisation of grain marketing. They became 654 the local agents of a Central Marketing Board through which all sales of grain had to be made both for home consumption and for export. Whereas formerly grain prices slumped immediately after the harvest, most peasants being obliged to sell their grain quickly, under the new scheme prices were stabilised throughout the year, and thus brought a great improvement to peasants' [65] receipts. But the scheme and the societies were also used to collect the peasants' taxes (paid in grain) which did not increase the popularity of co-operation.

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722 more than half the normal, but the efforts in 1943 [249] to recover to a more average crop may have succeeded.

3. Fish

[228] The general food shortage in Rumania gave a great fillip to the fishing industry. In the 12 months April 1942 to March 1943, some 40,000 tons of fish were caught in State waters besides 13,000 tons in rented and private waters. This is almost double the largest pre-war catch. During 1942 some 6,000 tons were salted down for winter use. In order to promote and introduce better organisation into the fishing industry a German-Rumanian Company has been established, the "Marea-Neagră," which will devote special attention to developing the Black Sea fisheries.

4. Agricultural Exports

439 The pre-war level of grain exports was well 243 maintained in 1939; wheat in particular was preminent with over a million tons. The exports of 1940, however, showed an immediate reflection of territorial changes and war shortages. Total grain exports in that year barely reached a million tons compared with the pre-war average of about 1·6 million tons. The following year showed a still sharper decline, wheat reaching only 5,000 tons and maize 120,000 tons. In 1942, despite the recovery of Bessarabia, it is most unlikely that even this level was maintained.

439 Oilseed exports, despite direct German interven- 249 tion aiming at an expansion of the crop, also fell below pre-war levels. Sunflower-seed exports, the principal oilseed, fell from an average of 30,000 tons in 1935-38 to 12,000 tons in 1940 and to 5,000 tons in 1941. Exports following the 1942 crop, though probably better, were not at all commensurate with the increased production, for a serious shortage of edible oil and fat had meanwhile developed in Rumania owing to decreased supplies of pig fat and to the retention by the peasants of their seed for consumption at home, or for disposal on the Black Market.

5. Administrative Control

241 Not even the most complete and efficient system 656 of administrative control could have assured the 435 country's food supplies and exports at normal levels during these three unfavourable years, but it is clear that Rumania's food difficulties have been aggravated by mistakes in economic policy and inadequate control measures. Bureaucratic methods of handling the peasants aroused antagonism and resistance. Supplies of tested seed and other farm requisites were not made available in time. On the collection and supply side, too much power was left in the hands of local prefects. But the most serious shortcoming of the official administration was the failure to establish a price control, and an appropriate relationship between agricultural prices and the cost of the things farmers buy. (In the absence of effective discipline this ratio needs to be strongly in the producers' favour if production and marketing of foodstuffs is to be maintained.) Prices of consumers' goods rose rapidly, owing to shortages, while the Government pegged the prices of farm produce at comparatively low levels. Consequently, the peasants curtailed production and sought better prices by selling much of their produce through Black Market channels. The mistake was officially admitted in the autumn of 1941 when grain prices were more than doubled, but the position still remained unfavourable to